TEAMS
Pre-Training Study Guide

Purpose	This guide is an introduction to using TEAMS for: ▪ New users ▪ Those who have not yet attended formal training.
Part I Pages 2 – 21	Part I contains information about: ▪ How TEAMS is organized ▪ How TEAMS processes information ▪ How to log on and off ▪ Security and access ▪ Keyboard functions and system signals ▪ How to navigate through screens ▪ Codes, alerts, error messages, and other communication features **Exercise 1:** Accessing TEAMS (p. 8) **Exercise 2:** Looking Up Clients in TEAMS (pp. 9-10) **Exercise 3:** Navigating in TEAMS (pp. 16-17)
Part II Pages 22 – 30	Part II provides an introduction to the following concepts: ▪ Cases ▪ Programs and subtypes ▪ Involvement units ▪ Participation codes
Before you arrive at training	Be sure you have read this guide and are familiar with the concepts. The basics explained in this guide will not be covered in class. Instead, the focus will be on entering practice applications in the training system and/or real applications in the Production environment. This will help you understand how to apply policy while entering information in TEAMS.

GENERAL TEAMS INFORMATION

"TEAMS" stands for:

The Economic Assistance Management System

BENEFITS OF TEAMS:

- **It facilitates case management**
  - Updates data online so it is always current
  - Assists in timely working of caseload by generating alerts (reminders) to worker

- **It decreases the need for paper**
  - Case notes, past notices, etc. are stored online

- **It is adapted to changing policy**
  - Allows the standardization of policy application across Montana

- **It is a 'menu driven' system**
  - Menus offer quick access to desired screens

- **Screens are organized to facilitate case entry and maintenance**
  - Screens generally follow the public assistance application form, and screens that capture related data are grouped together in an automatic sequence
  - Critical data is passed from screen to screen

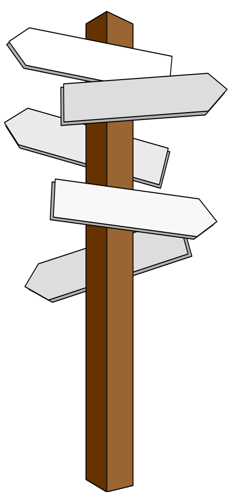
- **It is user friendly**
  - Entering and editing data is easy
  - Generates Error and Warning messages to assist with entry and to improve accuracy

TEAMS PROCESSING

- **Much information is processed online**
  When you press Enter, processing is immediate. The system validates the entry and displays the new information, generates error or warning messages if necessary, and moves to the next screen in the screenflow if applicable.

- **"Batch" processing is also used**
  Batch processing means that the work is done after the system is taken down in the evening. This is used for:
  - Overnight processing of large reports
  - Data processed in groups or batches (e.g., issuance of benefits each month)
  - Time-consuming processes (e.g., mass changes)
  - Printing of notices (letters)

NAVIGATION



ON EACH SCREEN:

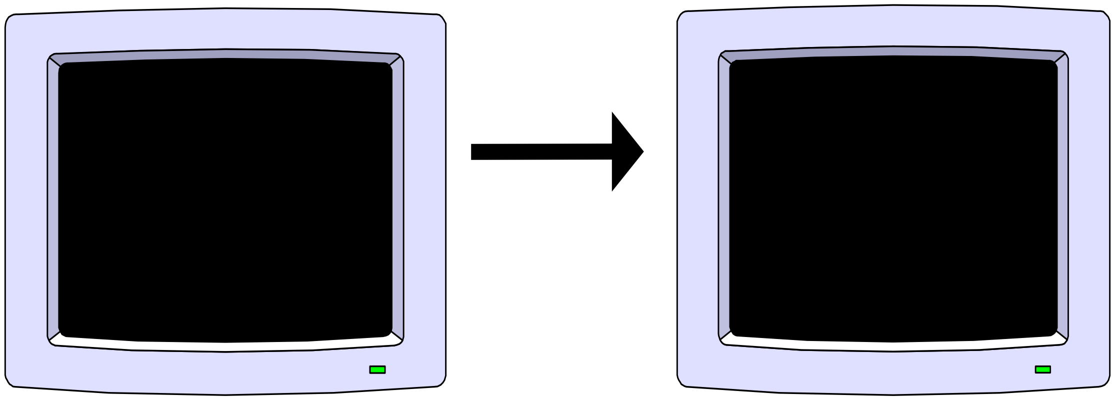
- The **cursor** is the flashing marker that indicates your position on the screen. Generally, when you first access a screen, the cursor will be set at the first space of the first enterable field.

- As you enter information in each required field, the cursor will automatically move to the next field.

- To move the cursor manually, use the **TAB** key or the **CTRL** key:
  - TAB advances the cursor to the next enterable field from left to right;
  - CTRL acts as a 'return' key to move the cursor downward one line into the next enterable field. (Note: Right-hand CTRL key only.)

NOTE:
Arrow keys are generally not used in mainframe applications. Use TAB and CTRL to move from field to field instead. This is much faster, and it also ensures that the cursor moves to the first enterable space in a field.

NAVIGATION (continued): FROM SCREEN TO SCREEN



There are basically three ways to navigate from screen to screen:

1. Selecting screens from menus
2. Using the default screenflow, and
3. Using the NEXTing function.

MENUS:

- On a menu, type any character in the space at the left of the screen name, and press Enter to access that screen. (Note: Menus require that the case number and benefit month be entered, and sometimes the program type/subtype, client ID, or SSN is also required to view a screen.)

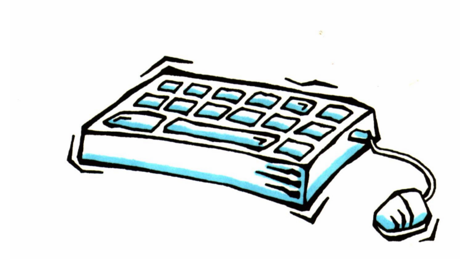
DEFAULT SCREENFLOW:

- The system is programmed to display screens in a default flow based on the program type you are registering or the program entered on the main menu (SYSE). If viewing a screen that is part of the default screen flow, pressing Enter will take you to the next screen.

NEXTING FUNCTION:

- To navigate directly from one screen to another, enter the next screen name in the NEXT field. (If the requested screen is not valid for the program and benefit month being viewed, or if the screen cannot be 'nexted' to, an error message will display.)

KEYBOARD FUNCTIONS



Navigation Keys, Key Combinations, and Misc. Keys

TAB	Moves cursor to the next enterable field from Right to left
HOME	Moves cursor to the top left enterable field.
SHIFT-TAB	Moves cursor *backward* to previous enterable field
HOME, SHIFT-TAB	Moves cursor to top left, then backward to bottom right field (the 'NEXT' field). This is the shortcut to the Nexting field.
CTRL (right)	Acts as a "return" key (moves cursor downward to next enterable field on next line)*
ENTER	Sends command to mainframe*

** CTRL and ENTER functions may be reversed in your county office. Keyboards can be remapped to the user's specifications.*

END	Erases from the cursor's position to the end of the field
ESC	Unlocks the screen if it will not respond to you and a symbol like is displayed in the lower left corner
PRINT SCREEN	Prints current screen
PAUSE	First step in logging off TEAMS
NUM LOCK	Activates number function on the number keypad

Function Keys

F1	Access Online Help
F2	Return to the previous Menu
F3	Return to main Menu (SYSE), or exit Online Help
F4	Displays Case Summary from SEPA, ABP1, VEHI, FIAC, THPL, INCU, among others
F5	Accesses specialized screens; normally F5 is listed at the bottom of the screen from which F5 is used, along with the screen you will access (FAIA, F5 to COOP)
F6	Return to the first SEPA screen if the case has more than one or "word wrap" in case/component notes
F7	Move to previous page on some multi-page screens and in Online Help
F8	Move to next page on some multi-page screens and in Online Help
F9	Return from Case Note creation to previous screen
F10	Display fresh Case Note screen
F12	Clear data from screens used to search for persons (CLIM, CLIR, CLIN)

SCREEN INDICATORS

SYSE SYSTEM SELECTION 05/03/04 17:15:06
KIM C

_ CLME CLERICAL MENU
_ ELTM ELIGIBILITY TECH MENU
_ CHCM CHILD CARE MENU
_ TAME TABLE MAINTENANCE MENU
_ CODF COPY DETAILS FOR NEW MONTH
_ TAFS TANF/FS PERSON SEARCH

CASE NUMBER : 000000
BENEFIT MONTH : 0000
PROGRAM TYPE :
SUBTYPE :
BUDGETING METHOD :
CLIENT SSN : 000000000
CLIENT NUMBER : 0000000
MR BUDGET MONTH : 0000
MA/FS DOC NUMBER :

NEXT-->

This space displays important symbols:

tells you that TEAMS is working or processing your command

means the screen is locked up because you may have attempted to enter information in an invalid location on the screen

If is displaying, press ESC to clear it and unlock your keyboard; then review the data you have entered

SECURITY and ACCESS

Objectives of TEAMS Security Design:

- A security class is assigned to your CS number by the Security Officer to:
  - Prevent and detect fraud
  - Maintain confidentiality
  - Protect Montana's system and data integrity

Each worker chooses a Password/Authorization Code

- This code is used to sign onto the system and to authorize benefits.
- Do not write down or let others know your Password/Authorization code.
- Your password must be at least 6 characters, and contain both letters and numbers. The system will require you to change it every 60 days.

ACHI (Action History) Screen

- ACHI records who worked on a case. If your security class allows you to update data, a record of the date, time, and screen name will appear on ACHI each time you press Enter on an enterable screen (whether or not you change any data).

System time-out:

1. TEAMS will display a password screen if you have not used the system for 30 minutes. You will need to enter your password to regain access (you will return to the TEAMS screen you visited last). This is to help prevent unauthorized use of your computer if you are away from your desk.
2. After an hour of inactivity, you will see the password screen described in #1, but when you enter your password and reaccess TEAMS, you will find that you are unable to navigate. You will receive an error message: "S010 Resign-on failure." There are a limited number of mainframe "sessions" available, and if your session is not used for one hour, you will be automatically logged out. You can simply press Enter when the message appears and reselect TEAMS from the State of Montana menu.

☞ Exercise 1: Accessing TEAMS ☜

(This exercise assumes you have been assigned a CS number, password, and account number.)

Objectives:
- Become familiar with the keyboard.
- Learn how to log on and off TEAMS.

Step 1: Logging On to TEAMS

1. If you haven't used the computer yet, have a person in your office show you how to log on to your office's network (procedures may vary from office to office).
2. Once you have accessed Windows, have someone show you where to find the icon for the Extra! software, which is used to access the mainframe.
3. When Extra is opened, you will see the Entry Validation screen. Enter your CS number in the USERID field, tab to the PASSWORD field and enter your password, and then tab to the ACCT field and enter your account number. Press Enter.
4. Press Enter again at the next screen; you should then see the CL/Supersession menu.
5. At the CL/Supersession menu, use the TAB or right CTRL key to move the cursor to the line that says 'CICS Production CICS.' Press Enter.
6. At the State of Montana menu, locate the line that says "TEAMS." Enter the number of that line in the Command field; press Enter.
7. You should see a screen with a TEAMS logo. Press Enter at this screen.
8. Now you will see the System Selection Menu (SYSE) screen. You have successfully accessed TEAMS!

Step 2: Logging Off TEAMS

1. Press the PAUSE key at the upper right of the keyboard. The screen should be blank.
2. Press F3. This will display the State of Montana menu.
3. Press F3 at the State of Montana menu AND again at the CL/Supersession menu.
4. When the Exit menu box appears, make sure your cursor is in front of the "exit" option, and press Enter.
5. You will now be at the Entry Validation screen (logon screen). You're not done yet…
6. To completely terminate all sessions and exit the Extra! software, click on the 'File' drop-down menu, and choose 'Exit Extra!'. This will probably generate a dialogue box asks you whether you want to exit Extra. Click OK in any such box.
   - It's important to exit Extra! in this manner; never turn off your computer or click the 'X' in the upper right corner of the Extra! window.

☞ Exercise 2: Looking Up Clients on TEAMS ☜

Objectives:
- Learn how to use inquiry functions to look up persons on the system.
- Become familiar with how TEAMS sorts identifying information about cases and individuals.

Step 1: Using the CLIN (Client Inquiry) Screen

(Note: The CLIN screen is strictly a “lookup” function for determining if clients are already on the TEAMS database. In your job, you might use the CLIR and/or CLIM screens instead. Those screens use the same “lookup” functions, but they also allow you to save people and/or change information about people already on the database. For this exercise, use CLIN.)

1. Log on to TEAMS as instructed in Exercise 1 (you will be at the SYSE menu).
2. On the SYSE menu, press the HOME key, and then press Shift-Tab (this performs a “backtab”). This should place your cursor in the ‘NEXT’ field at the lower right.
3. Type CLIN in the ‘NEXT’ field and press Enter. The CLIN (Client Inquiry) screen should appear.
4. Use your TAB key to access Section 2, “Client Identifying Information.” (Section 1, SSN, is used to look up a person by SSN. We will use just the name for this exercise.)
5. Enter a last name. (Use a name that is somewhat common, like Perkins or Watson. You can use a very common name like Smith or Jones if you wish, but the system will display hundreds of records.)
6. Press Enter. If there are any names that match the one you entered, you will see the CLIS (Client Short List) screen. Make note of the following:
   - On CLIS, do the letters ‘A’ or ‘D’ appear to the left of a name?
     - An ‘A’ means this is an *alias* record. An alias is another entry for the same person (for example, a woman might have been entered on TEAMS originally under her maiden name, and later an alias was stored for her married name). An alias might also indicate that there was an error with the original record, such as an incorrect birthdate or SSN. Alias entries “point” to the same database record as the main (primary) entry, and are very useful in maintaining client records.
     - ‘D’ means that *duplicate* records have been identified for the same person. Duplicate records are different than alias records – they indicate that workers have stored two or more unique records for the same person in error. This can happen when a worker doesn’t find the original client record and stores the person again as a new client. TEAMS assigns a new client ID number, and thinks they are two different people. As duplicates are discovered, they are reported to the Help Desk and a “lock” is placed on the duplicate so it can’t be used in a case.

7. On CLIS, choose any name by noting its ‘sequence’ number on the far left. Enter this number in the field at the bottom, and press Enter.
8. You should now be at the CLPR (Client Profile) screen. This screen shows a history of this client, such as which case number(s) he/she has been associated with, what programs they have applied for and/or received benefits in, and the time spans for each.
   - On CLPR, look at the following:
     - The top section shows more information about this person, such as their name and any aliases associated with them.
     - The center section probably lists one or more lines of information. Look at the codes at the far left of those lines. These indicate what public assistance program(s) the records refer to. You’ll learn more about these later, but some examples are FS (Food Stamps), AF (TANF Cash Assistance), and MA (Medicaid, with various subtype codes).
     - Does the ‘End Date’ column display ‘999999’ on any line? If so, this is an open case, and the Status column probably shows ‘OP’ (Open). If there’s an actual date in the End Date column, it means either the case was closed for that program or the application was denied. The Status column might show ‘CL’ (closed) or ‘DE’ (denied), or another code.
9. If you don’t see any records with 999999 in the end date, type a Y in the “Return to Client List?” field at the bottom and press Enter. This will take you back to CLIS. Select someone else from CLIS, and look at their CLPR screen. Keep searching until you find one with an “open involvement” showing an end date of ‘999999.’
10. Once you’ve found a client with an open involvement, find the Case Number column, and jot down the case number for that line.
11. Press F3 to go back to SYSE; then type the case number in the Case Number field. In the Benefit Month field, type this month or next month in MMYY format. Don’t press Enter yet.
12. Go to the ‘Next’ field, type ADDR, and press Enter. This takes you to the Address screen for the month that you entered.
13. After looking at the ADDR screen, press Enter. Since ADDR is part of the “default screenflow,” TEAMS should move you automatically to the next screen in the flow simply by pressing Enter. The default screenflow is used by the worker to enter/update eligibility information. Press Enter to move to the next screen (don’t do anything else; just press Enter.) Don’t worry if you don’t understand the screens. You’ll learn more about them later!
14. After you’ve viewed several screens, press F3 to return to SYSE.
15. Log out of TEAMS as described in Exercise 1.

    You’ve now successfully looked up a person in TEAMS and viewed some screens for a case! This exercise shows that you must first know the case number, and must enter the benefit month and screen name on SYSE to tell the system where you want to go.

SCREEN NAMES

EXPE	**Expe**nses
SEPA	**Se**tup **Pa**rticipations
CLIR	**Cl**ient **I**nquiry / **R**egistration

Naming conventions for screens:

- Screen names are always four-letter acronyms.

General rule:

- For a one-word screen name, the acronym is the first four letters of the word.
- For a two-word screen name, the first two letters of each word are used.
- For screen names with three or more words, the first two letters of the first word are used, plus the first letter of the 2nd and 3rd word.

Each screen performs certain functions or allows you to enter a certain type of data.

For example:

- CLIR allows you to "inquire" (search) on a person and perform functions related to the registration of applications
- EXPE allows entry of expenses for the household
- SEPA allows the worker to establish the "participation" of each household member in each program

MENUS

```
INME                    INQUIRY MENU                  05/04/04  09:51:25
FA                                                    KIM   C
_ CLIN  CLIENT INQUIRY                     _ CAP1  CASE PROFILE 1
_ HOSU  HOUSEHOLD SUMMARY                  _ ISHI  ISSUANCE HISTORY
_ BEHI  BENEFIT HISTORY                    _ NOHS  NOTICES HISTORY SUMMARY
_ CANS  CASE NOTES SUMMARY                 _ ACHI  ACTION HISTORY
_ OVCH  OVERPAYMENT/ CLAIM HISTORY         _ SDI1  SDX INTERFACE INQUIRY
_ MEEA  MEDICARE PART A ELIGIBILITY        _ BEII  BENDEX INTERFACE INQUIRY
_ CSDP  CSED DISREGARD PAYMENT HIST        _ MEEB  MEDICARE PART B ELIG
_ WALS  CHILD CARE WAITING LIST            _ CHSS  CHILD SUPPORT SUMMARY
_ PEHI  PERSON HISTORY                     _ SAMA  SANCTION MAINTENANCE
_ CSAP  CHILD SUPPORT ARREARS PAYMT.       _ VOPH  VOUCHER PAYMENT HISTORY
_ SAPH  SANCTION PERSON HISTORY

                        CASE NUMBER       :000080
                        PROGRAM TYPE :
                        SUBTYPE           :
                        BUDGETING METHOD  :
                        CLIENT SSN        :000000000
                        CLIENT NUMBER     :0000000
                        DOC WARR NUMBER   :                 NEXT-->
```

Menus simply provide quick access to relevant screens from a single location. There are several different menus in TEAMS that are useful for different purposes and by different groups of users.

- Your access to certain menus and screens is based on your security clearance
- The desired screen is selected from the list by typing any character in front of it.
- Depending on the screen selected, menus may require the benefit month, program/subtype, client ID, Social Security number, or document number to be entered
- F2 and F3 keys are designed for use with menus.

  -- F2 will go back to the **previous** menu
  -- F3 always returns to **SYSE**, the main menu

CODES / COMMUNICATING WITH TEAMS

```
DEPR – Deprivation

Code/Description

DE   Deceased
DV   Divorced
IC   Incapacitated
SP   Separation (incl. never married/unknown)
SS   Single Parent/Special Circumstances
UP   Unemployed/Underemployed Parent
```

Entry screens require that codes be entered in specific fields to tell the computer how to use the information for processing of applications and benefits.

All valid codes for each screen are stored in a *table* within TEAMS. When a code is entered, TEAMS compares the code to the values on the table, and determines if it is valid for that field. If it is not, an error message will appear.

- The valid codes for each field, such as the sample above, are listed in Online Help. (A description of Online Help can be found on the next page.)
- You must know policy to use the correct codes.
- It is imperative to use correct codes to ensure that applications and benefits are processed correctly.

Examples of different kinds of codes:

- Expense codes are used to record different kinds of expenses that participants have. The codes determine how TEAMS will count those expenses for the different programs.
- Income codes are used to designate the various types of income a person may have. The codes determine how TEAMS will count that income for each program.
- Relationship codes are used to tell TEAMS how a person is related to the PI (Primary Information person).

ONLINE HELP

Online Help is available within TEAMS.

> ***The TEAMS Code Tables*** - This document lists and defines valid codes for enterable fields (also called “field help”).

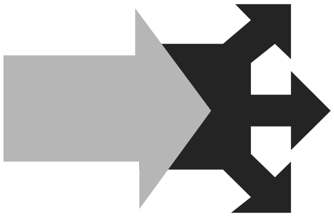
ACCESSING ONLINE HELP

When workers use TEAMS, they can access Online Help shown above. This assists them in entering data without having to exit the system or find paper manuals.

- To access “field help” to find lists of all valid codes for a particular field, place the cursor in the field that requires the code, and press F1.

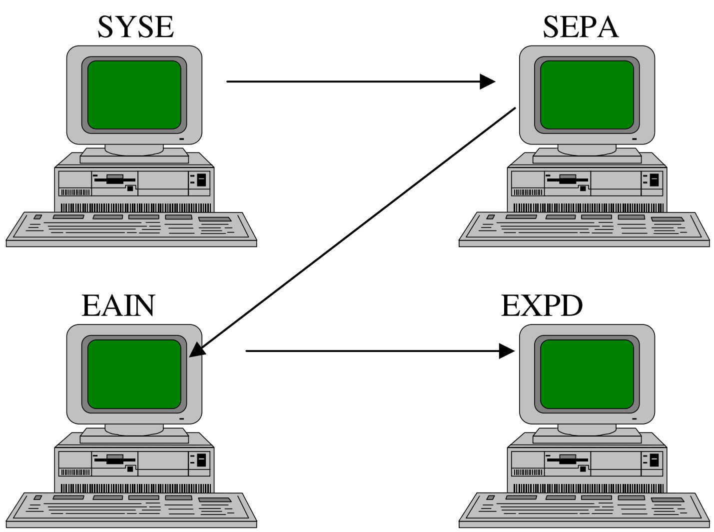
- To return to the screen or field, press F3.

DEFAULT SCREEN FLOW



- As described briefly in Exercise 2, screens are chained together in a "default screen flow."
- The default screen flow is determined by the program(s) registered. If more than one program is registered for the case (for example, Food Stamps and TANF Cash Assistance), the screens that are unique to each program will be blended together so that the worker automatically passes through all screens required for each program.
- When the worker completes the required information on each screen (or when he/she simply wants to view the screen), pressing Enter will move to the next screen in the screen flow.
- You can exit the default screen flow by pressing F3 (to go back to SYSE), by pressing F2 (to go back to the last menu used), or by typing another screen name in the 'NEXTing' field.

NEXTING FUNCTION



- The NEXTing function allows navigation directly from one screen to another, outside of the default screen flow. (Not all screens can be "nexted" to directly; some must be selected from a menu or a specific screen. Others have security limitations.)
- Type the desired screen name in the 'NEXT' field and press Enter.

☞ Exercise 3: Navigating in TEAMS ☜

Objectives:
- Gain more experience with the default screenflow
- Become comfortable with NEXTing and menus

NOTE: You will need a case number and benefit month to complete this exercise. You can use the case number and benefit month used in Exercise 2, or you can find a different one. (No data will be changed on the case; you will simply view different screens.)

1. Log on to TEAMS.
2. On the SYSE menu, enter a CASE NUMBER and BENEFIT MONTH.
3. Select ELTM from the menu by typing any character in the space in front of that option. Press Enter. The Eligibility Technician Menu will appear.
4. Select APEM and press Enter. The Application Entry Menu will appear.
5. Select FIAC. The Financial Accounts screen will appear for the specified case.
6. On FIAC, press Enter.
7. The LIAS screen (Liquid Assets) will appear, even though you did not type anything in the 'NEXT' field. This is because the FIAC screen is part of the default screen flow, and LIAS is the next screen in the flow for the case.
8. On LIAS, press Enter.
9. The OTAS (Other Assets) screen will appear, which is the next screen in the default screen flow.
10. Continue pressing Enter to go through more screens in the screen flow, if desired.
11. Press F2. The APEM menu will be displayed (the most recent <u>menu</u> you used).
12. Press F2 again. The ELTM menu will display (the menu you used before INME).
13. Press HOME and then SHIFT-TAB to get to the 'NEXT' field.

14. Type SSDO in the NEXT field and press Enter. The SSDO (SSN/Date of Birth/Sex) screen will appear.

15. Press HOME and then SHIFT-TAB to access the NEXT field again.

16. Type EAIN and press Enter. The EAIN (Earned Income) screen will appear.

17. Press HOME and then SHIFT-TAB again.

18. Type RECI and press Enter. The RECI (Residency/Citizenship/Identity) screen will appear.

19. Press the F3 key to return to SYSE, the main menu.

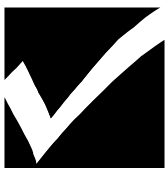
20. Log off TEAMS as shown in Exercise 1.

- You have now gained more practice using the SYSE menu as the initial starting point for all TEAMS screens, and you have also used other menus besides SYSE to access various screens.

- You have become more familiar with the default screen flow (e.g., FIAC, LIAS, OTAS) and with Nexting directly to screens (SSDO to EAIN to RECI).

- You have learned that TEAMS displays information only for the case number and benefit month that you entered on the menu. TEAMS will display information for that case and benefit month until you specify a different case number and/or benefit month on a menu.

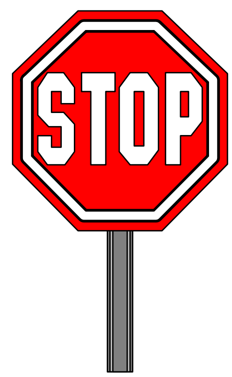
TEAMS MESSAGES



Warning Messages:

- Message at bottom of screen gives advice to the user or warns of possible problems
- Warning messages do not prevent the user from proceeding

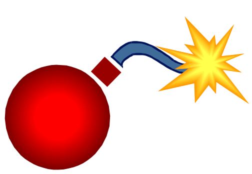
Error Messages:



- Prevent user from further processing until situation is corrected
- Fields which contain the error will be highlighted
- Message text at bottom of screen indicates the nature of error

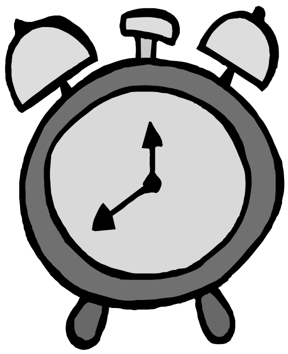
Critical Error Messages (ABORT or ABEND):

- Indicate a problem with the mainframe



  - Talk with your supervisor; you may have to call the Help Desk
  - If you get an abort or abend message, print the screen and write down the sequence of actions you took just before you got the message

WORKER ALERTS



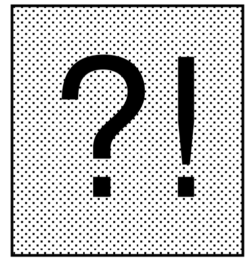
- Advise worker of a task coming due or of action to be taken
- Remind worker of timeliness requirements, verifications due, and other information
- Can be set by the system or by a worker; workers can set alerts for themselves or for other workers
- Aid in time management
- Act as a communication tool when case is transferred to a different worker or county

There are two screens for worker alerts: ETAL and ETAD.

- **ETAL - ET Alerts Screen**
  - Displays all alerts specific to the case being viewed (whether due or not)
  - The oldest alert is listed first
  - Due date is the date the action should be taken
  - TEAMS generates some alerts for you; you can also set alerts for yourself or other workers
  - Alerts that have been acted on can be deleted
  - Source field indicates automatic alerts and the screen function which initiated the alert
  - You can delete alerts here for the current case you are working

- **ETAD - ET Alerts Due Today or Overdue**
  - Lists all due and overdue alerts for your entire caseload
  - Oldest alert is listed first for each case
  - Check ETAD **DAILY** as a case management tool
  - You can delete alerts for your caseload on ETAD

PROGRAM AND PERSON ALERTS

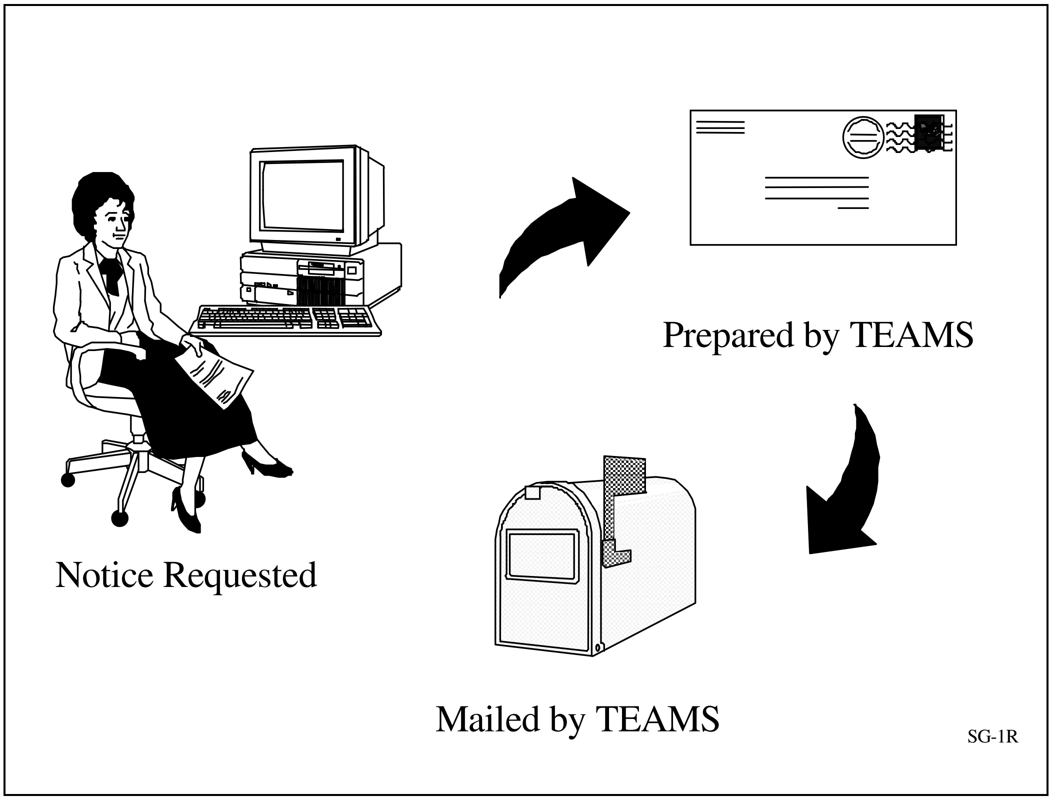


- Program and Person alerts are for a worker's use to provide cautions or warnings to anyone who views the case.
- For example, the program/person alert code '?!' means "See case notes."
- These alerts are entered and maintained on the PRAP (Program And Person Alert) screen:

PRAP - Program And Person Alerts

- Can enter alerts at the "program" level within a case (for example, can enter an alert for the Food Stamps program, which would pertain to all members who receive Food Stamps in that case).
- Can also enter information specific to a person. Person alerts follow the client from case to case, until the alert is deleted.
- Program and person alerts are useful for warning workers of situations such as dangerous clients, limited-English-speaking clients, and overpayments.
- Alerts entered on PRAP are displayed on CLPR, PRIP, and SEPA.
- Must be deleted (using PRAP) if they no longer apply to the person or case.

NOTICES



- A notice *situation* is identified by the worker or by TEAMS. A notice situation is an action or event that requires a letter (notice) to be sent to the client.

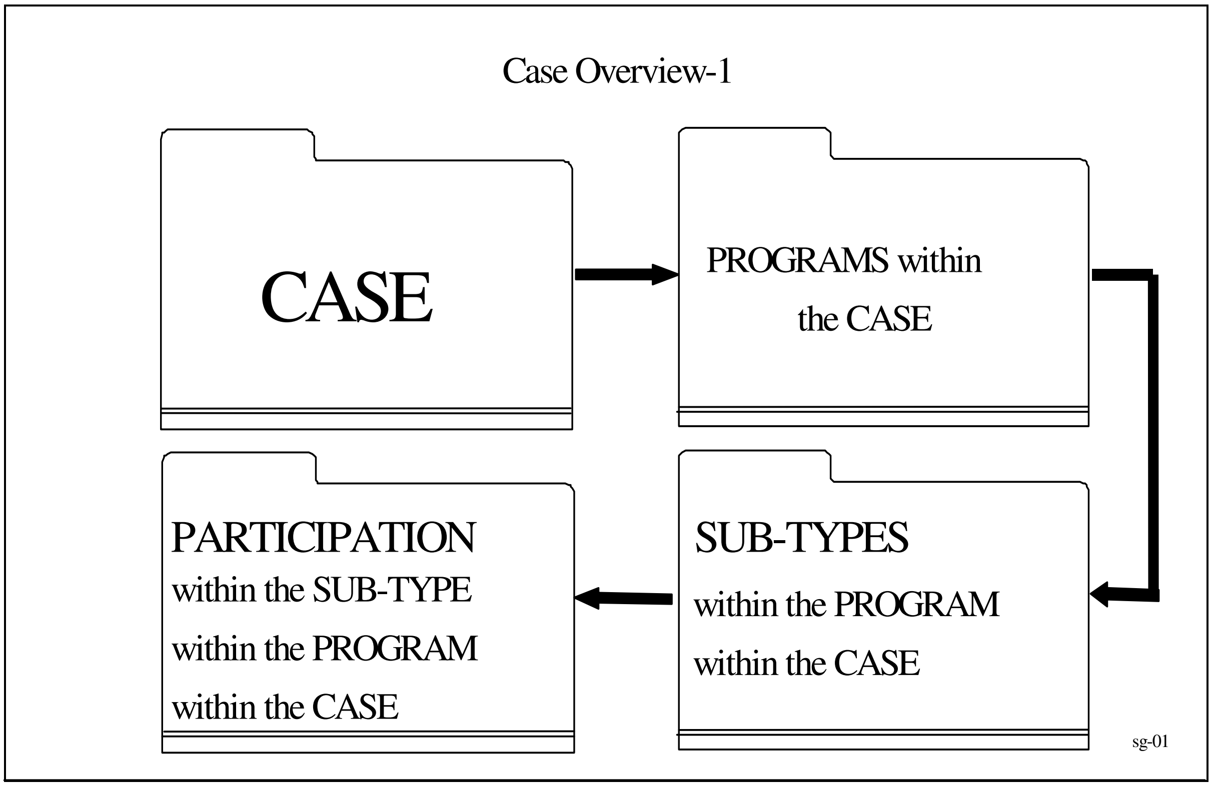
- Dozens of standard notices are programmed into TEAMS. The worker requests the notice, fills in information that the computer cannot add automatically, and authorizes the notice to be sent.

- Notices also have blank lines at the end for freeform text to be added.

- TEAMS prints notices overnight; they are mailed the following work day.

TEAMS STUDY GUIDE
Part II

CASE STRUCTURE

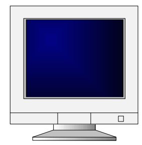


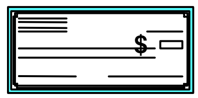
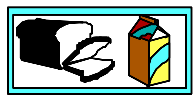
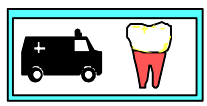
- When using TEAMS, all persons and all programs/subtypes can be managed in **one** case, as appropriate within policy requirements. A person can be in more than one case at a time but not in the same program/subtype more than once in each month.

- TEAMS can display all information for the case at a glance.

- To build a case, the worker begins with an application for assistance, conducts the personal interview (as defined by policy), and then determines which programs, subtypes and participations will be applicable. Programs and subtypes will be discussed next.

PROGRAMS



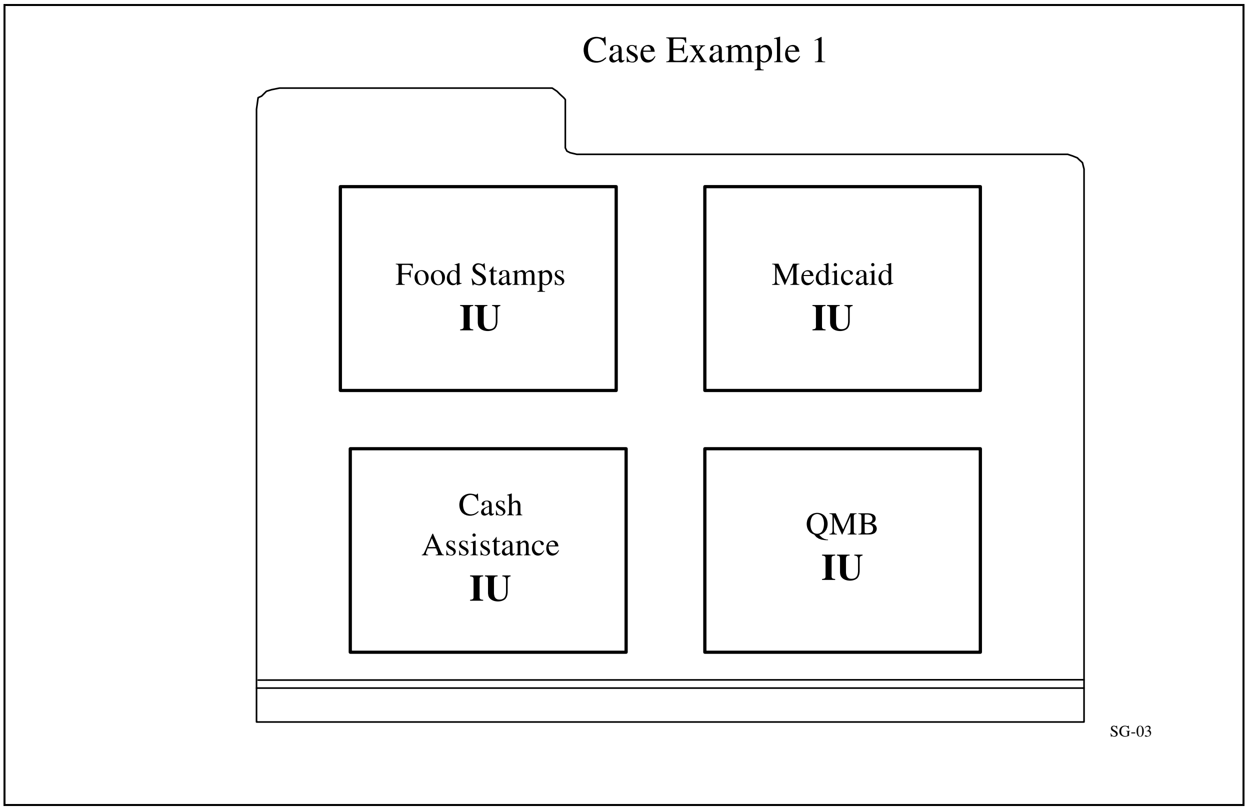
Program Names		TEAMS Program Type Codes
TANF Cash		AF
Food Stamps		FS
Medical Assistance		MA (w/sub-types)
Qualified Medicare Beneficiary		QM (w/sub-types)
Special Low Income Medicare Beneficiary		SL (w/sub-types)
Emergency Assistance		EM

- All programs in TEAMS have two-letter codes, and several have two-letter subtype codes as well to differentiate the various subprograms.

- TEAMS will process TANF Cash Assistance, Food Stamps, Medical Assistance (Medicaid programs), Qualified Medicare Beneficiary benefits, and Special Low Income Medicare Beneficiary benefits. It will track Emergency Assistance.

- As mentioned previously, all programs can and should be included in the same case, as appropriate per policy.

INVOLVEMENT UNITS

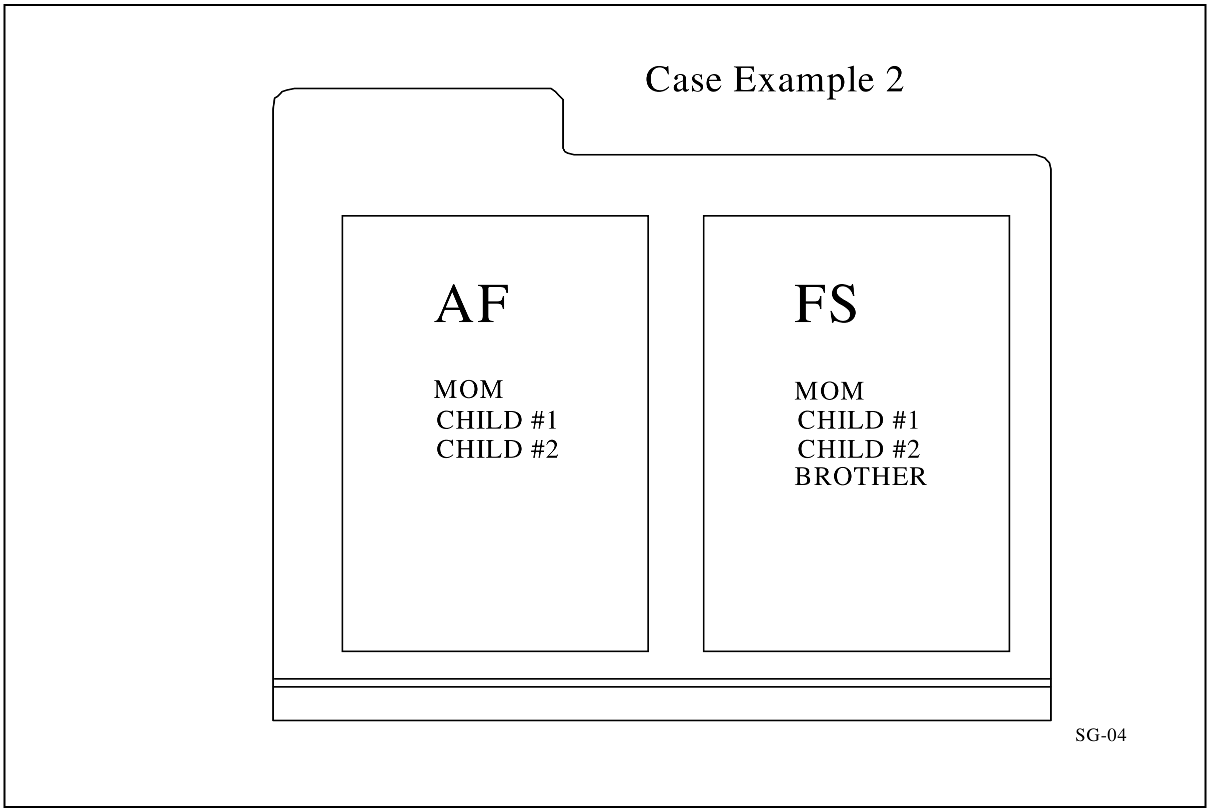


Each program (AF, FS, EM) and subtype (MA/RK, MA/FM, QM/QD, etc.) has different eligibility criteria and may have different restrictions and/or benefit periods.

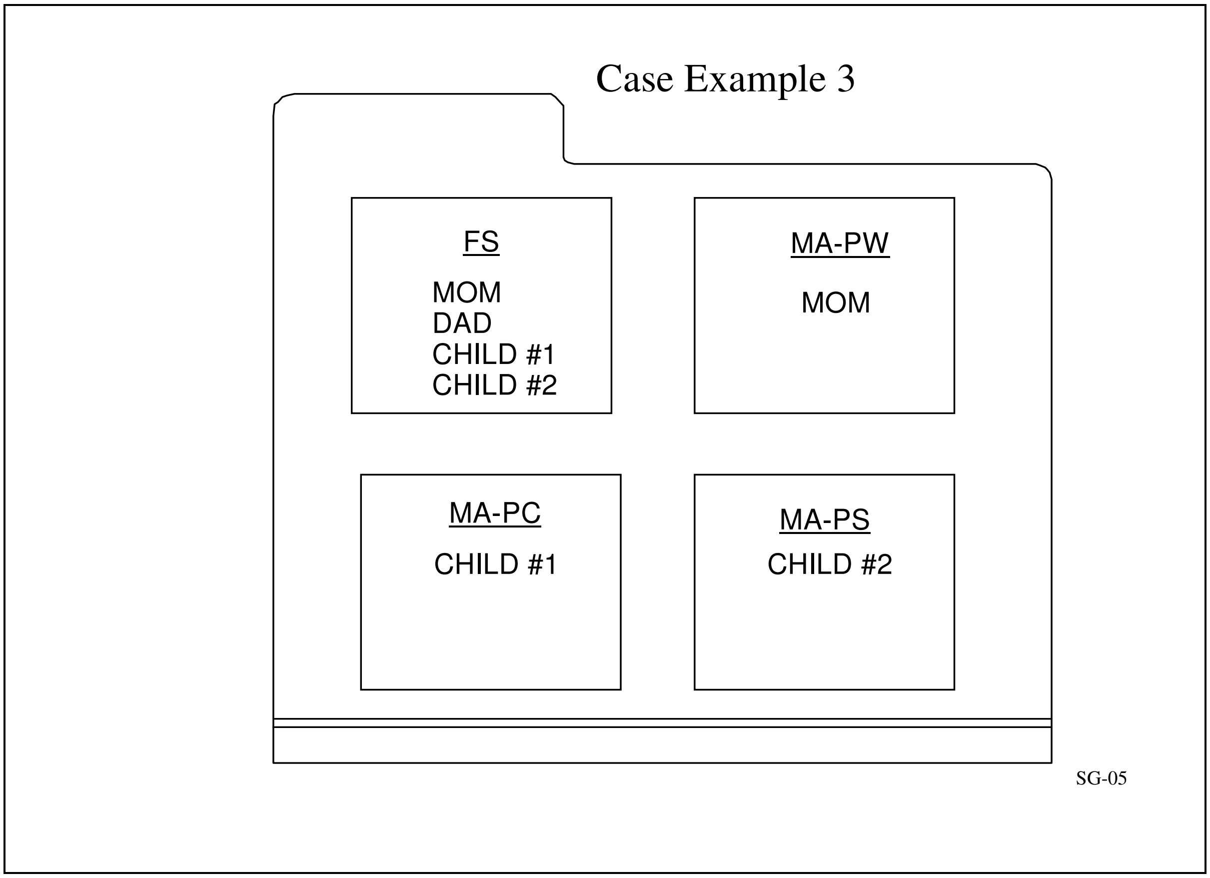
To efficiently track and sort this data and to determine eligibility for each set of requirements within a case, TEAMS looks at each program or subtype as a separate entity, called an "Involvement Unit" (IU). A case can involve one or several involvement units. An involvement unit can be like a mini-case within a case, depending on the participation of the persons involved.

One very important note is that TEAMS cannot track two involvement units of the same type in the same case. Therefore, you cannot put two Food Stamps (FS) involvement units (IUs) in the same case; they must be separate cases. However, you can put a TANF Cash Assistance (AF) IU, a Food Stamps (FS) IU, and one or more Medicaid IU's in the same case (as long as each Medicaid has a different subtype).

PROGRAMS / SUBTYPES / INVOLVEMENT UNITS



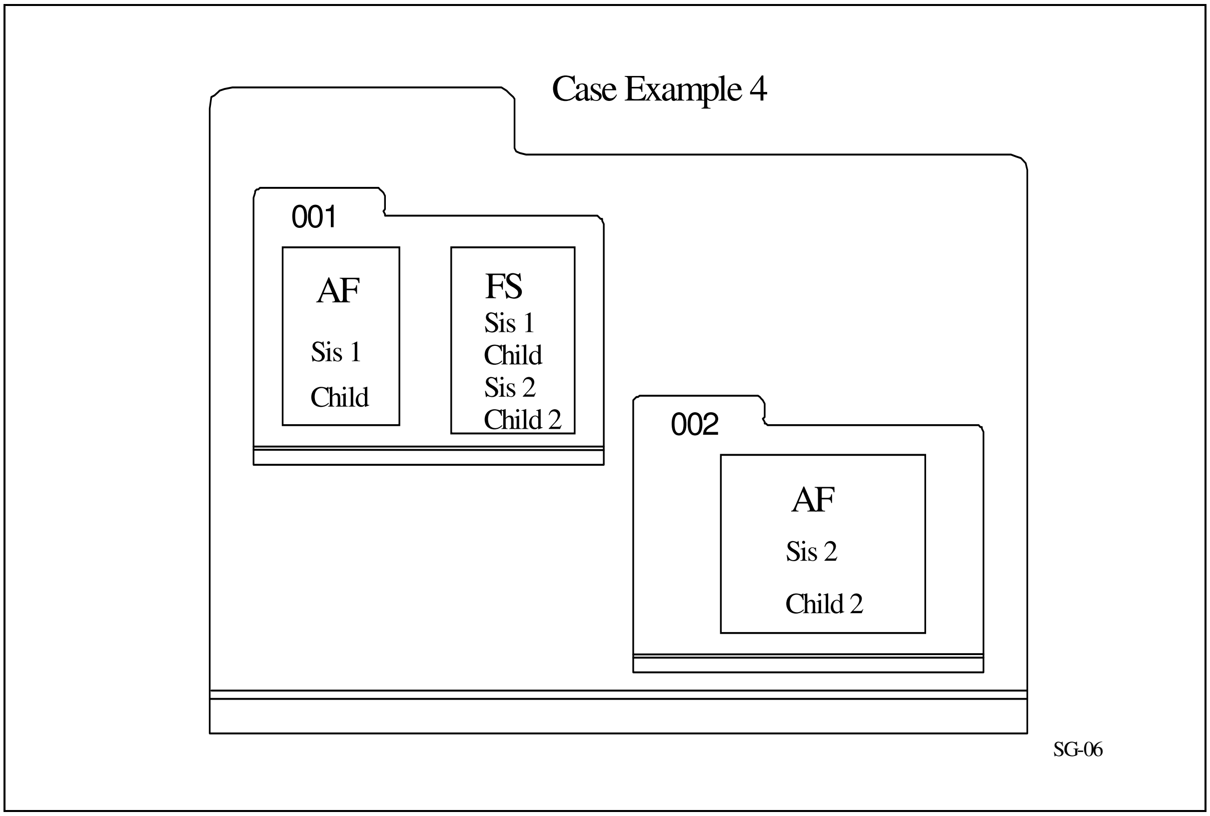
- Look at the case example above. In this scenario, a woman has applied for Cash Assistance (AF) and Food Stamps for herself, her two children and her brother.
- The program types would be AF and FS.
- There would be two involvement units: One for AF and one for FS. The brother could be part of the FS involvement unit, according to the rules for that program. However, he could *not* be part of the AF involvement unit, because the rules for that program require that only those adults related to children through marriage or parentage can be part of that IU.
- Let's say one child also was disabled and was eligible for Medicaid due to that disability. The child could have a Medicaid involvement unit by himself with the appropriate subtype code for that kind of Medicare eligibility.



In this scenario, a family applies for assistance requesting Medicaid for all eligible members and food stamps for the household.

Mom is pregnant and therefore could be eligible for a subtype of Medicaid for pregnant women (MA/PW). Child #1 is 14 months old and meets the criteria for another subtype of Medicaid for children under 6 (MA/PC). Child #2 is 8 years old and is eligible for a different subtype that is for children over 6 (MA/PS). Dad does not meet any Medicaid requirements, so he is not eligible for medical assistance, but all members are eligible for FS.

The four possible involvement units for this scenario are shown above.



- The scenario for the cases listed above resulted when two sisters, living in the same house, applied for AF and FS. If they were considered as a single household per FS policy, they would have to be in the same FS involvement unit (as shown above in #001).

- Two separate cases would be required for the AF involvement units because TEAMS cannot track two involvement units of the same type in one case. One sister's AF would be included in the first case (shown above as 001), and the other would have her own case (shown as 002).

PARTICIPATION CODES

Participation codes tell TEAMS how to consider each person for each involvement unit in determining eligibility and benefits. The worker must know policy in order to use the correct participation code for each person.

The codes help TEAMS determine:

- Does this person meet the age requirement for the program?
- Is this person's resources (assets) and income considered in determining eligibility?
- Will he or she receive benefits, or is he/she included for a different reason?

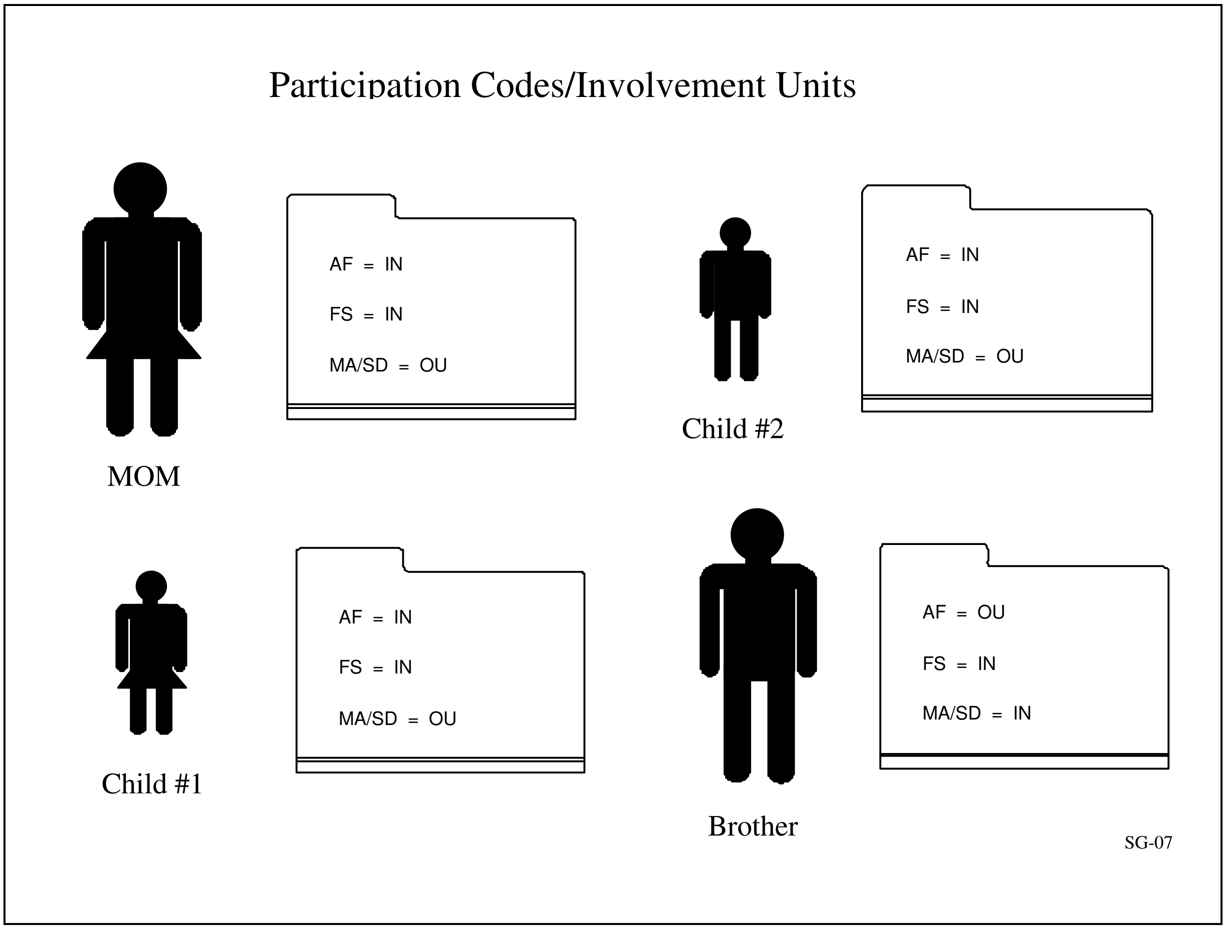
Participation codes also help to prevent a person from receiving duplicate benefits (for example, TEAMS checks to be sure that the same person isn't receiving benefits in two different AF cases, two different Medicaid subtypes in the same case, etc.).

Two common participation codes are:

- **IN -** The person is "in the assistance unit"; his/her income and resources are considered, and s/he also receives benefits.
- **OU -** The person is "out of the assistance unit"; his/her income and resources aren't considered, and s/he doesn't receive benefits for that program.

Each member of a household could affect the eligibility and benefit amount of each involvement unit, depending on the rules for that program and subtype.

The graphic on the next page shows a sample case using the 'IN' and 'OU' participation codes for various involvement units.



In the illustration above, Mom and both children are eligible for both TANF Cash Assistance (AF) and Food Stamps, so they are all coded 'IN' for both programs.

However, because the Food Stamps rules allow the mom's brother to receive benefits but the TANF Cash Assistance rules do not, he would be 'IN' for FS and 'OU' for AF. His income and resources would be counted only for the FS program.

There are MANY more participation codes. Some are valid for all programs, and others are only valid for some programs. You will learn more about participation codes at training.

Exercise 4: TEAMS Treasure Hunt

Please print this out, complete it, and give it to your trainer prior to the start of your training session.

1. After pressing the Pause key to log off of TEAMS, how many times must you press F3? ____________
   a. On what page(s) of the Pre Training Guide did you find this answer? ________

2. Bring a screen-print of CLPR (Client Profile) for a client with at least one open program. Highlight the open program(s).
   a. On what page(s) of the Pre Training Guide did you find this answer? ________

3. What two pieces of information do you need, in order to review screens on a case?

   ____
   a. On what page(s) of the Pre Training Guide did you find this answer? ________

4. What is the difference between F2 and F3?

   ____

   a. On what page(s) of the Pre Training Guide did you find this answer? ________

5. What keyboard shortcut will take your cursor to the NEXTing field quickly?

   ____
   a. On what page(s) of the Pre Training Guide did you find this answer? ________

The End!

We hope that this guide was helpful to you in understanding the basic framework and functioning of the TEAMS system.

We look forward to seeing you at the training session! Remember to bring your completed copy of Exercise 4 to hand in. Thanks!